

Checklists/Worksheets/Sample Letters, etc

Each State has adapted the SOAR Model to processes that are unique to their own individual state.

The following listed checklists and forms which can be downloaded from the following website are applicable to the SOAR process nationally:

<http://soarworks.prainc.com/article/soar-tools-and-worksheets>

Identifying SOAR eligible Applicants

- ☐ Identifying SOAR Applicants checklist

Establishing the Protective filing Date

- ☐ SSA-Adult Disability Report (*located under the SSA Form TAB*)
- ☐ SSA-1696 Appointment of Representative (*located under the SSA Form TAB*)

Requesting Medical Records

- ☐ Agency Release of Information form
- ☐ SSA-827 (Authorization to Disclose Information to SSA) (*located under the SSA Form TAB*)

Application Worksheets

- ☐ SSI & SSDI Non-Medical Documentation checklist
- ☐ SSI Income Resource Worksheet
- ☐ Applicant Tracking Worksheet
- ☐ Worksheet 5, Medical Evidence Worksheet
- ☐ Medical Summary Report (MSR) Worksheet this guide can help you compile information necessary for the MSR. *It encompasses the following worksheets from the SOAR 2-day training curriculum: Substance Use, Functional Information, and Applicant Assessment.*

Rental Loan Agreement

- ☐ Sample Rental Loan Agreement

The following listed checklists and Letters can be downloaded per designated link:

Guidelines for processing Appeals <http://soarworks.prainc.com/topics/appeals>

- ☐ Tips For Pending Application and Appeals

Letters Specific for Idaho use which are located on the Idaho SOAR Website and are located according to the link:

- ☐ Sample Medical Summary Report Cover Letter (to be submitted to DDS with completed MSR.)
- ☐ Sample Application Packet Cover Letter(to be submitted to SSA with completed Application packer)

Sample Medical Summary Reports

- ☐ Report 1, Lester Rush
- ☐ Report 2, Annette Farnsworth
- ☐ Report 3, Oliver Daniels (an Abbreviated Report)
- ☐ Sample Employer Letter to Support SSI/SSDI Claim
- ☐ Sample Letter from Collateral Source